

Amendments to the Claims:

This listing of claims will replace all prior versions, and listings of claims in the application:

Listing of Claims:

1 1. (Currently amended) A computer-implemented method for a salesperson
2 to track and identify sales opportunities within a sales territory over a network, the method
3 comprising ~~the steps of:~~
4 ~~providing, from customers of the salesperson within the sales territory, receiving,~~
5 at one or more computer systems hosting a network-based sales territory planning and targeting
6 tool, information regarding customers' needs of customers of a salesperson within a sales
7 territory; and
8 receiving, at the one or more computer systems hosting the network-based sales
9 territory planning and targeting tool, information regarding an install base of products and/or
10 services of the customers, the provided install base information including origination information
11 indicating those products and/or services that originate from an employer of the salesperson and
12 those products and/or services that originate from competitors of the salesperson's employer;
13 generating, with one or more processors associated with the one or more
14 computer systems hosting the network-based sales territory planning and targeting tool,
15 information based on the from the provided customers' needs and install base information[[,]]
16 tagging as sales opportunities those products and/or services offered for sale by the salesperson
17 representative that match the customers' needs and those products and/or services of the
18 customers' install base of products and/or services offered by the salesperson representative that
19 the customers are likely to consider purchasing;
20 storing the provided customers' needs information, the customers' install base
21 information, and the tagging information in a central database associated with the one or more
22 computer systems hosting the network-based sales territory planning and targeting tool that is
23 controlled by the salesperson's employer and that is accessible over a computer network;

24 generating, with the one or more processors associated with the one or more
25 computer systems hosting the network-based sales territory planning and targeting tool,
26 information configured for displaying a first user interface on a computer coupled to a network,
27 the first user interface having visual elements that enable the salesperson to formulate[[ing]] a
28 search of the central database according to selected ones of a plurality of parameters related to
29 customers in the salesperson's sales network and the products and/or services offered for sale by
30 the salesperson;

31 receiving, at the one or more computer systems hosting the network-based sales
32 territory planning and targeting tool, results of applying the search to the central database; and

33 ~~identifying, results of the applied search, at least the sales opportunities, the~~
34 ~~customers' install base of products and/or services, the origination information and unknown~~
35 ~~information that identifies where the sales representative should gather additional install base~~
36 ~~information, and~~

37 providing generating in response to receiving the results of the search and the
38 identifying step in a tabular worksheet, with the one or more processors associated with the one
39 or more computer systems hosting the network-based sales territory planning and targeting tool,
40 information configured for displaying a second user interface on a computer coupled to the
41 network, the second user interface configured according to the search with a tabular worksheet
42 organized across the customers in the salesperson's sales territory and the products and/or
43 services offered for sale by the salesperson, entries in the tabular worksheet including at least the
44 tagged sales opportunities, the customers' install base of products and/or services, the origination
45 information, and unknown information that identifies where the salesperson should gather
46 additional install base information.

1 2. (Currently amended) The computer-implemented method of claim 1,
2 further comprising including generating, with the one or more processors associated with the one
3 or more computer system, information that visually codes[[ing]] entries in the tabular worksheet
4 of the second user interface according to whether the entries are ~~identified~~ tagged as sales

5 opportunities, whether the entries originate from the sales representative's employer or a
6 competitor, or whether the entries represent unknown information.

3. (Canceled)

1 4. (Currently amended) The computer-implemented method of claim 1,
2 ~~wherein the provided~~ further comprising:
3 receiving, at the one or more computer systems hosting the network-based sales
4 territory planning and targeting tool, information specifying a sales hierarchy of the
5 salesperson's employer, each role in the sales hierarchy having a set of predetermined rights and
6 responsibilities; and
7 wherein information stored on the central database is selectively accessible[[,]]
8 via the visual elements of the first user interface according to a role of the salesperson defined in
9 the sales hierarchy of the salesperson's employer.

1 5. (Currently amended) The computer-implemented method of claim 1,
2 further comprising:
3 receiving, at the one or more computer systems hosting the network-based sales
4 territory planning and targeting tool, information provided by the salesperson's manager defining
5 the tabular worksheet for the salesperson; and
6 wherein generating the information configured for displaying the second user
7 interface comprises generating the information configured for displaying the second user
8 interface based on the information provided by the salesperson's manager defining the tabular
9 worksheet for the salesperson ~~the provided information in the tabular worksheet in the providing~~
10 ~~step is limited to results of a search on the information stored in the database.~~

1 6. (Original) The computer-implemented method of claim 5, wherein the
2 search is carried out for at least one parameter selected from customer, region, industry, product,
3 service, origination information and unknown information.

1 7. (Currently amended) The computer-implemented method of claim 1,
2 further comprising: ~~the step of~~
3 receiving, at the one or more computer systems hosting the network-based sales
4 territory planning and targeting tool, information provided by a manager of the salesperson
5 defining the tabular worksheet for the salesperson; and
6 customizing, with the one or more processors associated with the one or more
7 computer systems hosting the network-based sales territory planning and targeting tool, an
8 appearance and ordering of the entries within the ~~provided~~ tabular worksheet based on the
9 information provided by the manager of the salesperson.

1 8. (Currently amended) An information storage medium storing a network-
2 based software application configured to enable a salesperson to track and identify sales
3 opportunities within a sales territory over a network, ~~[[and]]~~ the information storage medium
4 comprising[[,]] ~~stored on a computer-readable medium:~~
5 code configured to store customer information in a central database ~~that is~~
6 ~~controlled by the salesperson's employer and that is accessible over a computer network,~~ the
7 customer information including information regarding customers' needs and information
8 regarding an install base of products and/or services of the customers, the install base
9 information including origination information indicating those products and/or services that
10 originate from an employer of the salesperson and those products and/or services that originate
11 from competitors of the salesperson's employer;
12 code configured to tag as sales opportunities the customer information
13 corresponding to those products and/or services offered for sale by the sales representative that
14 match the customers' needs and those products and/or services of the customers' install base of
15 products and/or services offered by the sales representative that the customers are likely to
16 consider purchasing;
17 code configured to generate a first user interface having visual elements that
18 enable the salesperson ~~[[for]]~~ to formulate a search of the central database according to selected

ones of a plurality of parameters related to customers in the salesperson's sales network and the products and/or services for sale by the salesperson;

~~code configured to carry out an identification, as a result of the search, of at least the sales opportunities, the customers' install base of products and/or services, the origination information and unknown information that identifies where the sales representative should gather additional install base information, and~~

code configured to ~~provide~~ generate a second user interface in response to results of the search, ~~and of the identification~~ the second user interface configured according to the search with [[in]] a tabular worksheet on a computer coupled to the network organized across the customers in the salesperson's sales territory and the products and/or services offered for sale by the salesperson, entries in the tabular worksheet including at least the sales opportunities, the customers' install base of products and/or services, the origination information, and unknown information that identifies where the salesperson should gather additional install base information.

9. (Currently amended) The information storage medium software application of claim 8, further comprising code for visually coding entries in the tabular worksheet according to whether the entries in the tabular worksheet of the second user interface are ~~identified~~ tagged as sales opportunities, whether the entries originate from the sales representative's employer or a competitor, or whether the entries represent unknown information.

10. (Currently amended) The information storage medium software application of claim 9, wherein the code for visually coding entries is configured to provide the entries in the tabular worksheet in a color-coded format.

11. (Currently amended) The information storage medium software application of claim 8, further comprising:

3 code configured to receive information specifying a sales hierarchy of the
4 salesperson's employer, each role in the sales hierarchy having a set of predetermined rights and
5 responsibilities; and

6 wherein the code configured to generate the first user interface ~~provide the stored~~
7 ~~information in a tabular worksheet~~ is further configured to render the customer information
8 selectively accessible via the visual elements of the first user interface according to a role of the
9 salesperson defined in the sales hierarchy of the salesperson's employer.

1 12. (Currently amended) The information storage medium ~~software~~
2 ~~application~~ of claim 8, further comprising:

3 code configured to receive information provided by the salesperson's manager
4 defining the tabular worksheet for the salesperson; and

5 wherein the code configured to generate the second user interface comprises code
6 configured to generate the second user interface based on the information provided by the
7 salesperson's manager defining the tabular worksheet for the salesperson ~~provide the stored~~
8 ~~information in a tabular worksheet~~ is further configured to limit the customer information in the
9 ~~tabular worksheet to results of a search on the information stored in the database.~~

1 13. (Currently amended) The information storage medium ~~software~~
2 ~~application~~ of claim 12, further including code configured to carry out the search for at least one
3 parameter selected from customer, region, industry, product, service, origination information and
4 unknown information.

1 14. (Currently amended) The information storage medium ~~software~~
2 ~~application~~ of claim 8, further comprising:

3 code configured to receive information provided by a manager of the salesperson
4 defining the tabular worksheet for the salesperson; and

5 code configured to customize an appearance and ordering of the entries within the
6 provided tabular worksheet based on the information provided by the manager of the
7 salesperson.

Appl. No. 10/755,162
Amdt. dated December 29, 2009
Reply to Office Action of September 29, 2009

PATENT